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ham, Denis

What's Happening Food Costs?

Summary of Report



United States
Department of
Agriculture

Economic
Research
Service

March 1984

What's happening to food costs? How much are they changing, and why? How much of the food dollar goes to the farmer and how much to food processors and marketers? Because of the great interest in these questions, Congress has directed the U.S. Department of Agriculture to prepare relevant answers regularly. This report, from USDA's Economic Research Service, will bring you up to date, focusing on developments during 1983.

1983 Food Prices Rose the Least in 16 Years

Food price inflation has slowed dramatically the past 4 years under the pressure of large food supplies and recession-weakened consumer demand. Food prices, as measured by the Consumer Price Index (CPI), rose only 2.1 percent in 1983. That was about half the 4-percent rise in 1982 and one-fourth the rise in 1981. Moreover, it was the least since 1967, before the Vietnam War overheated the economy and started a long upward spiral of inflation.

Food prices in 1983 rose more slowly at supermarkets and other grocery stores than at eating places, continuing a trend of recent years. Prices at grocery stores went up a scant 1.1 percent. Restaurant meal prices climbed 4.4 percent. In both cases, prices increased much slower than they had the year before.

There were a number of reasons for the slowdown. Food supplies were abundant despite a severe summer drought that drastically reduced grain harvests. Production of livestock increased, generating record meat supplies. Meanwhile, the costs of food processing, distributing, and retailing rose more slowly than in recent years. And finally, prices of imported foods and fish hardly increased.

This report was prepared in the National Economics Division of the Economic Research Service by Denis Dunham, and is based on a more technical report "Food Cost Review, 1983" to be issued soon. See page 7 for information on how to obtain the report. The Economic Research Service carries out research on many aspects of food economics of concern to consumers, farmers, and the food industry. To learn about some recent publications on food research, see page 8.

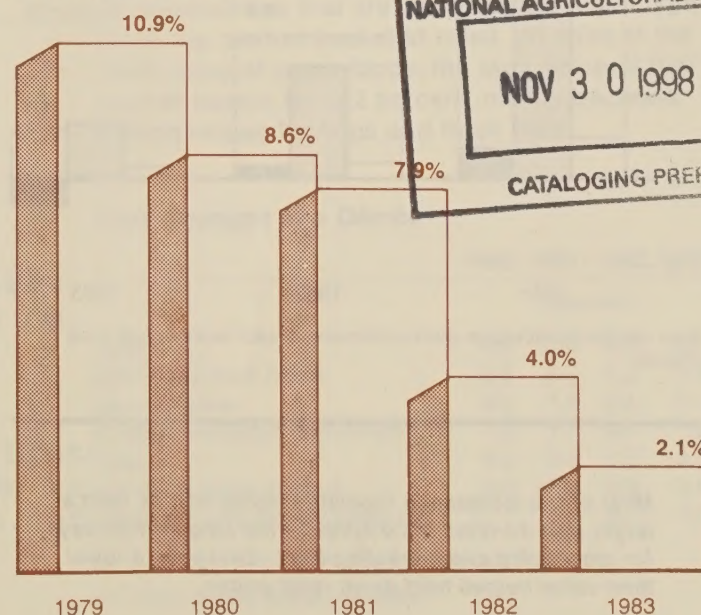
This meant good news for food shoppers. Prices of most foods at the grocery store changed little from the year before, and some prices, including the price of pork, fell sharply. Starting in April, increasing meat supplies caused monthly drops in retail meat prices.

For farmers, though, the news was mixed. Although livestock prices dropped, grain and oilseed prices strengthened. The farm value of foods sold in grocery stores, after rising only 1.2 percent in 1982, actually fell 2.2 percent. Most of the decline reflected lower prices for meat animals and fresh fruit. Farm values rose for poultry, eggs, and food products derived from grains and oilseeds.

Higher prices for imported foods and fish caused only a fifth of the 1.1-percent rise in grocery store food prices. The remaining four-fifths came from a higher farm-to-retail price spread. The farm-to-retail price spread, or difference between what farmers receive for food (the farm value) and its retail price, is the charge for processing, distributing, and retailing farm-produced foods.

But the rise in the farm-to-retail spread was only 2.5 percent, much smaller than in 1982 and the least in 11

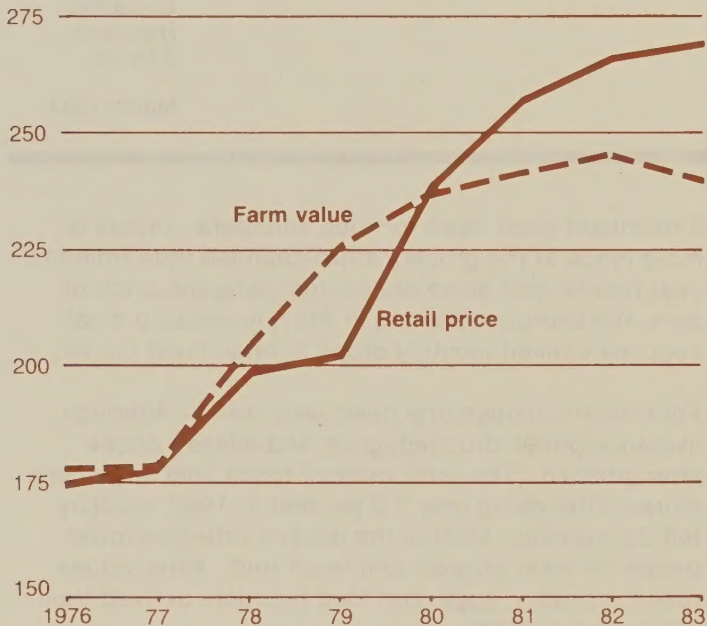
Rise in Food Prices Continues Downward Trend



CPI, annual averages.

Retail Food Prices Outpace Farm Value

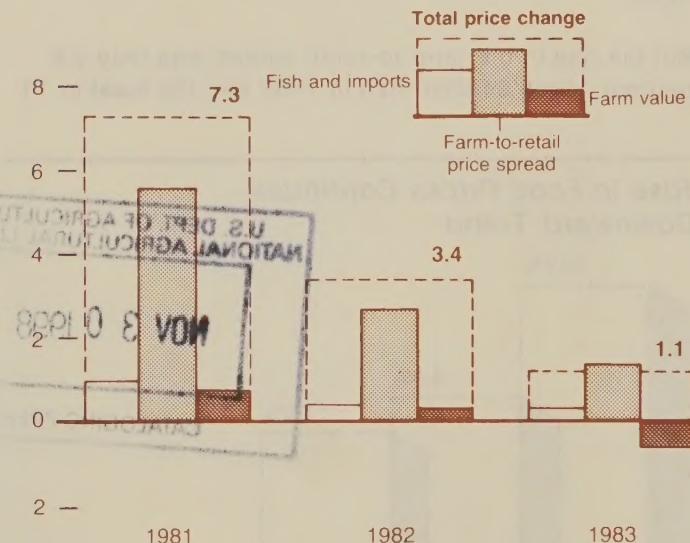
% of 1967



Data for market basket of domestically produced farm foods.

Lower Farm Value Held Down Rise in Foodstore Prices

Percent



Bars represent percentage point contribution of each factor to total price change.

Most of the increase in foodstore prices comes from a larger farm-to-retail price spread—the amount that pays for processing and marketing food. Last year, a lower farm value helped hold down retail prices.

years. Smaller increases in labor and energy costs were mainly responsible.

Lower inflation and abundant supplies of raw foodstuffs benefited the food marketing industry as well as food shoppers. This industry—mainly firms performing the basic functions of assembling products from farmers, food processing, wholesaling, and retailing—is a major sector of the U.S. economy, and one of the largest in terms of the number of jobs it provides. Food sales increased strongly in 1983, boosting productivity, profit margins, and employment in most segments of the industry.

Food Prices Up Less than Others

For the fifth consecutive year, food prices rose less than other prices. Among the other major items in the CPI, prices of apparel and upkeep rose 2.5 percent, housing 2.7 percent, transportation 2.4 percent, medical care 8.7 percent, and entertainment 4.3 percent. The 2.1-percent rise in food prices, which make up almost one-fifth of the CPI, helped reduce the overall inflation to 3.2 percent in 1983, the lowest since 1967.

Prices of Most Foods Relatively Stable

Prices of most of the foods that we buy at the supermarket averaged just pennies higher or lower in 1983 than in 1982. However, prices of some foods varied widely during 1983, particularly pork and eggs. Pork prices dropped sharply as farm output expanded. Egg prices rose sharply at the end of the year.

Here's a wrapup of price changes at the supermarket last year, comparing average prices for all of 1983 with those of a year earlier.

Meat and Poultry. Record large supplies and weak consumer demand kept red meat prices down. Retail beef prices averaged 1.5 percent less than those in 1982. Pork prices, although they fell sharply during the year, averaged only 1 percent lower for the year.

Poultry prices rose 1 percent in response to a slight cutback in production of broilers late in the year. Egg prices averaged 5 percent higher, reflecting reduced supplies, caused in part by an outbreak of influenza in several States that destroyed about 1 percent of all laying hens. Egg producers also cut back production in response to higher feed costs.

Dairy Foods. Retail prices of milk and other dairy products rose only 1.2 percent, the least in a decade. Fresh milk prices have been stable for 3 years because there has been no increase in the farm price support for milk since 1980 and milk production has been increasing.

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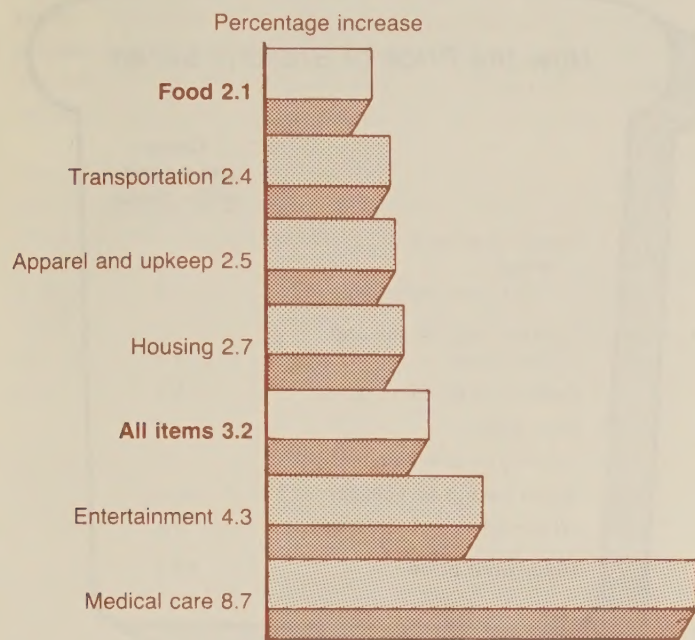
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Food Prices Rise Less Than Others



CPI, annual averages, 1983.

How Register Tapes Compared Average Prices Paid at Foodstores

Item and unit size	1982	1983
Some prices fell . . .		
Ground chuck, 100% beef, 1 lb.	\$1.78	\$1.73
Round beef roast, boneless, 1 lb.	2.62	2.55
Bacon, 1 lb.	2.24	1.94
Pork chops, center cut, 1 lb.	2.38	2.37
Frankfurters, all meat, 1 lb.	1.82	1.81
Lettuce, 1 lb.	.56	.55
Apples, red Delicious, 1 lb.	.64	.59
Orange juice, frozen, 1 lb.	1.47	1.37
Tomatoes, canned, 1 lb.	.55	.53
Rice, long grain, uncooked, 1 lb.	.50	.47
Coffee, ground, 1 lb.	2.52	2.46
Some prices rose . . .		
Chicken, 1 lb.	.71	.72
Eggs, Grade A large, 1 doz.	.87	.89
Bread, white pan, 1 lb.	.53	.54
Milk, one-half gal.	1.12	1.13
Ice cream, regular, 1/2 gal.	2.10	2.16
Tomatoes, 1 lb.	.74	.79
Grapefruit, 1 lb.	.36	.37
Sugar, white, 1 lb.	.33	.35
Shortening, veg. oil, blend, 1 lb.	.79	.82
Potato chips, 1 lb.	2.40	2.50
Cola, nondiet can, 16 oz.	.47	.48
Others stayed the same		
Potatoes, 1 lb.	.21	.21
Pork & beans, canned, 1 lb.	.43	.43

Source: Bureau of Labor Statistics,
Department of Labor

Crop Foods. Retail prices of most foods derived from crops averaged higher in 1983 partly because of a sharp jump in grain and soybean prices when the drought severely damaged crops in the summer. Retail prices of fats and oils—such as vegetable shortening and margarine—averaged 1.3 percent higher. Prices of cereals and baked goods went up 3.2 percent, mainly due to a rise in the farm-to-retail price spread, representing charges for manufacturing and distributing cereals and baked goods—which account for most of their price.

The price of sugar and artificial sweeteners rose 3.6 percent. For all sugar, as well as candy and other sweets, average prices were only 1.9 percent higher.

Fruit and Vegetables. Last year's fresh fruit prices averaged 4.3 percent less than those of 1982. Fruit prices dropped because of much larger supplies, particularly of oranges and apples. California orange production was record large during the 1982/83 season.

Prices of many fresh vegetables, including lettuce, tomatoes, and potatoes, rose sharply at times during 1983, reflecting the impact of a wet, cool spring, the summer drought, and other adverse weather on supplies. However, the cumulative effect of last year's aberrant weather on total fresh vegetable supplies was small. Vegetable prices averaged about 3-1/2 percent higher, mainly reflecting higher lettuce and tomato prices. Potato prices averaged slightly lower for the year, but a smaller fall potato crop boosted December 1983 potato prices 32 percent above year-earlier levels.

Farm Value Down 2 Percent

USDA estimates the payment to producers for a fixed list or "market basket" of foods. This payment, called the farm value, measures what farmers receive for the raw food commodities that are equivalent in quantity to the foods in the market basket at retail. In spite of the higher farm value of some foods, the farm value of the entire market basket fell 2.2 percent, mainly because of lower farm values for hogs and fresh fruit.

Food Price Changes at a Glance

Item	1980	1981	1982	1983
	Percent			
CPI-All food ¹	8.6	7.9	4.0	2.1
Food eaten away from home	9.9	9.0	5.3	4.4
Food eaten at home	8.0	7.3	3.4	1.1
Domestically produced farm foods ²	7.2	7.7	3.6	.9
Farm value	5.0	2.3	1.2	-2.2
Farm-to-retail price spread	8.6	10.8	5.0	2.5
Imported foods and fishery products	11.7	5.8	2.7	1.9

¹Data from Consumer Price Index, Bureau of Labor Statistics.

²Data from USDA market basket statistics.

Farmers received about 6 percent less for meat products in USDA's shopping cart in 1983 than in 1982. Larger supplies of meat and weak demand lowered the farm values of beef and pork. The farm value of fresh fruit fell 24 percent in response to a two-fifths larger orange crop, one-third more grapes, and larger supplies of most other fresh fruits.

In contrast, a combination of production cutbacks and the summer drought boosted farm values of some commodities. For example, farmers received 58 cents for a dozen eggs sold in the store, 5 cents more than in 1982. The farm value of frying chicken increased 2 cents per pound. The farm value of cereal and bakery products rose 5-1/2 percent, mainly because of higher prices for the vegetable oil and sugar ingredients. Wheat supplies were plentiful, and prices stayed relatively low. Farmers received 4.3 cents for the wheat in a 1-pound loaf of white pan bread selling for 54 cents in supermarkets, 0.1 cent less than for 1982.

Farm Value Share of Food Price Declines

The farm value averaged 33 percent of the cost for a market basket of foods, down 1 percentage point from 1982. This share compares with 35 percent in 1981 and 37 percent in 1980, and extends a long downturn from a high of about 50 percent in the mid-1940's. In recent years abundant food supplies held down farm prices; retail prices rose faster because of rising charges for processing and marketing.

Farm value percentages vary greatly among foods. The farm value contributes more to the retail price of eggs,

How the Price of Bread is Sliced

	Cents per pound, white bread
Farm ingredients	
Wheat	4.3
Other farm ingredients	.8
Nonfarm ingredients and other costs	1.8
Delivery of wheat to miller	1.0
Flour milling	1.1
Delivery of flour to baker	.5
Bread baking and selling	36.3
Wholesaling and retailing	8.4
1983 retail price	54.2

meats, poultry, and dairy products than it does for most other foods. Thus, changes in prices received by farmers for these commodities in 1983 affected retail food prices the most. For example, lower farm prices for hogs accounted for a slight decline in retail pork prices, while higher farm prices for eggs caused a rise in retail egg prices. Higher poultry prices at the farm level caused all of the rise in retail poultry prices.

The farm value of most foods that come from crops represents a small share of the retail price. Last year farmers received 26 percent of retail fresh fruit and vegetables prices, 16 percent of processed fruit and vegetable prices, and 11 percent of bakery and cereal product prices. Thus, the 25-percent decline in the farm value of fresh fruit caused only a 6-percent decline in average retail fruit prices.

Farm Value Share of Foodstore Prices

	1983 retail price	Farm value	Farm value share of retail price
Eggs, large, 1 doz.	\$0.92	\$0.58	64%
Choice beef, 1 lb.	2.38	1.36	57
Milk, 1/2 gal.	1.13	.59	53
Chicken, 1 lb.	.73	.38	52
Pork, 1 lb.	1.70	.76	45
Frozen orange juice, 12 oz.	1.04	.44	42
Sugar, 1 lb.	.35	.14	40
Potatoes, russet, 10 lbs.	2.46	.67	27
Oranges, Calif., 1 lb.	.38	.08	21
Tomatoes, 1-lb. can	.53	.05	9
White bread, 1 lb.	.54	.05	9
Lettuce, 1 lb.	.55	.05	9

Computed from unrounded data.

Farm-to-Retail Price Spread Widens

The difference between farm prices and retail prices rose 2.5 percent in 1983. That spread represents food industry charges for assembling, processing, distributing, and retailing food commodities.

Farm-to-retail price spreads were higher for most food groups. Price spreads for poultry and eggs, however, declined by about 3 percent. Over time, increases in farm-to-retail price spreads for these products have been smaller than those for most other foods because egg and poultry processing operations have grown larger and more efficient.

The price spread for meat products rose 4 percent, a larger increase than for most other foods. However,

the 1983 increase followed 2 years of smaller than average increases in the farm-to-retail price spread for meat. The drop in livestock prices, particularly hog prices during much of 1983, was not fully reflected at the retail level because of the upward trend in marketing costs and strengthening consumer demand.

The price spread for dairy products rose about 2 percent, the least in 8 years, because of large milk supplies and a much smaller rise in marketing costs. The price spread for bakery and cereal products increased 3 percent, and the spread for processed fruits and vegetables increased 2.5 percent. These increases reflected rising labor and energy costs and the high degree of processing these foods undergo.

Spending on Domestic Food at \$312 Billion

During 1983, consumers spent \$312 billion for foods produced on U.S. farms—\$13 billion, or about 4 percent, more than in 1982. This amount included purchases of farm foods both in foodstores, roughly two-thirds of the total, and at away-from-home eating places. It excluded the money we spent for imported foods and seafoods. Rising prices boosted spending for domestically produced foods, and consumers bought larger quantities of many foods—especially red meats and fresh fruits. Consumers spent the most on meat products. For 1982, the latest data available, meat purchases were 29 percent of total expenditures on farm foods.

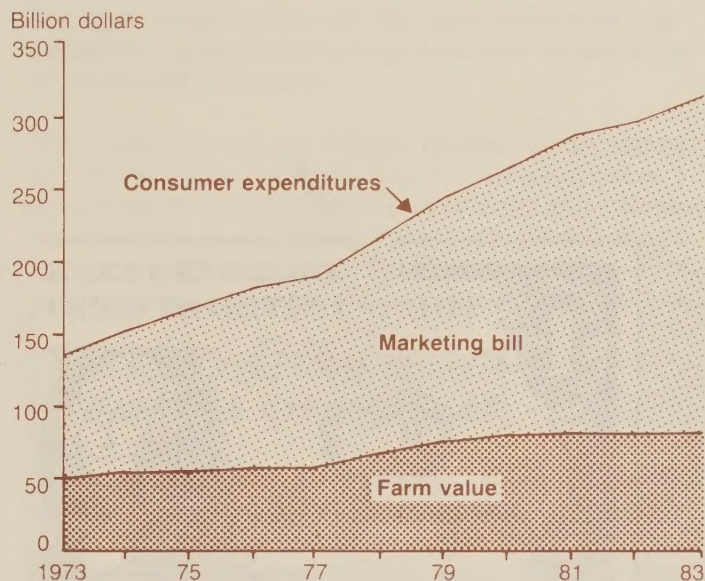
What Consumers Bought with Their Food Dollars

Foods	Billion dollars	Percent
Meats	86.9	29
Fruits and vegetables	63.8	21
Dairy products	43.8	15
Bakery products	30.6	10
Poultry	15.1	5
Grain mill products	9.0	3
Eggs	5.2	2
Other foods	44.7	15
Consumer expenditures	299.1	100

1982 data

In 1983, farmers received about 27 percent, or about \$84 billion, of last year's spending for farm-produced foods, nearly the same amount received in 1982. This share is a weighted average of the 33-percent farm share of food at home and the much lower 16-percent share of away-from-home food spending. The remaining \$228 billion—the marketing bill—went to the food industry for handling, processing, and retailing foodstuffs after they left the farm. The marketing bill was up by \$12 billion in 1983, and thus accounted for virtually all of the year's increase in expenditures for farm food.

Marketing Bill Adds Most to Food Spending



For domestically produced farm foods purchased by civilian consumers both at foodstores and eating places.
1983 preliminary.

Marketing Function's Share of the Food Dollar

Item	Cents	
	Food at home	Food away from home
Processing	30	18
Intercity transportation	6	3
Wholesaling	10	7
Retailing	21	n/a
Food service	n/a	56
Total marketing share	67	84
Farm value	33	16

n/a = Not applicable.

Higher Labor Costs Add Most to Marketing Bill

About \$6 billion of the \$12 billion rise in the marketing bill can be traced to labor costs. Packaging, transportation, and energy added another \$2 billion. Here is USDA's analysis of what happened to food industry costs for the following:

Labor. Increases in wages, salaries, employee benefits, and employment boosted total food industry labor costs by 6 percent to \$103 billion in 1983. This was one-third of total consumer food spending, and was over one-fifth larger than the farm value.

The increase in labor costs, while a large dollar amount, represented a moderate percentage increase for the second consecutive year. Following a pattern set in 1982, economic problems caused by the recession and intensified market competition, particularly in food retailing, held down the wages of food industry workers. Most collective bargaining settlements in

What a Dollar Spent on Food Paid for in 1983



Includes food at home and away from home. Other costs include property taxes and insurance, accounting and professional services, promotion, bad debts, and many miscellaneous items.

1983 preliminary.

1983 provided much smaller wage increases for retail foodstore clerks and meatcutters. In some markets, workers in food retailing did not receive any wage increase during the first year of their contract. Labor costs were tempered by reduced rates of pay for their employees, and some relaxation of work rules that retailers felt were hurting productivity. In the meatpacking industry, some workers accepted lower wages and benefits to help companies overcome problems and save their jobs.

Packaging. Costs for packaging materials were modestly higher in 1983 at \$24 billion, or nearly 8 percent of total consumer expenditures for farm foods.

Transportation. Nearly stable freight rates held the rise in food transportation costs to about 4 percent. Railroad freight rates for food products were only 1 percent higher; truck rates for hauling produce and other foods were held down by lower diesel fuel prices and strong industry competition, reflecting an increase in numbers of independent truckers.

Energy. The fastest rising component of the marketing bill for several years has been energy. Its cost rise last year was slowed by large petroleum stocks that forced a substantial decline in diesel fuel prices. However, rising natural gas and electric rates caused the energy bill of food processors, wholesalers, and retailers to go up about 6 percent to \$13 billion. Energy made up over 4 percent of consumer food expenditures.

When you spend a dollar on food at the supermarket or restaurant, what does your money pay for? The chart above shows that in 1983, 27 cents went back to the farmer, 33 cents paid for labor costs, and the remaining 40 cents covered many other marketing costs—from packaging to profit.

Food Industry Profit Margins Rise

The economic recovery that boosted food spending and lowered average commodity prices boosted profit margins of the food industry. Based on Federal Trade Commission data for the first 9 months of 1983, overall after-tax profits of manufacturers of food and kindred products rose from 2.9 percent of sales in 1982 to 3.1 percent in 1983. Returns on stockholders equity declined from 12.4 percent to 12.0 percent. These profit rates were near the average of those in other recent years.

After-tax profits of food chains averaged 1.0 percent of sales in the first 9 months of 1983, compared with 0.8 percent a year earlier. Much of the rise reflected the elimination of losses by one company from store closings in 1982. Also, there were reduced labor, energy, and other cost pressures, and small gains in productivity.

Food Industry After-Tax Profit Margins

Quarter	Food manufacturers		Retail food chains	
	1982	1983	1982	1983
	Percent of sales			
I	2.8	2.3	0.1	0.9
II	3.2	3.4	1.2	1.2
III	2.7	3.5	1.0	.9
IV	3.6		1.5	

These partial-year figures, combined with profit margins for wholesalers and restaurants, suggest that corporate profits before taxes earned by the food industry in 1983 were about \$14 billion or 4-1/2 percent of consumer food spending.

Food Expenditures Increase Less than Income

Food expenditures are rising less than consumer income. This illustrates one way in which we are still improving our standard of living. A declining proportion of our income is required for food, leaving more money for other things.

In 1983, Americans spent about 15.6 percent of total personal disposable income on food (domestically produced as well as imported foods and fish). This share was slightly less than the 16.2 percent 10 years ago, and was substantially less than the 18.7 percent of 20 years ago. Much of this decline is attributable to a de-

cline in the farm value component. The farm value of the foods produced on U.S. farms declined from 5.9 percent of consumer disposable income 20 years ago to 3.6 percent last year.

The proportion of income spent on food varies widely by income levels. Consumers in the lowest income groups spend a much larger proportion of their income for food than consumers at the highest income levels.

Would You Like More Detailed Information?

This report is based on a larger report, "Food Cost Review, 1983," to be published this spring. In addition to reporting on recent developments in food prices, farm-to-retail price spreads, food spending, profits, and marketing costs in the food industry, it discusses price spread changes for leading food items such as Choice beef, milk, and bread. It also includes statistical tables and charts.

To receive ordering information when the report is issued, send your name and address to U.S. Dept. of Agriculture, Economic Research Service, National Economics Division, 500 12th St. S.W., Room 278, Washington, D.C. 20250, or contact Denis Dunham at (202) 447-8801.

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